

Project Managers' Advisory Group

MINUTES October 20, 2008

Attending:

(* = by phone)

Bob Giannuzzi	EPMO
Gaye Mays*	EPMO
Charles Richards	EPMO
Barbara Swartz	EPMO
Jim Tulenko	EPMO
Valerie Maat	EPMO
Lynne Beck	DHHS DMH/DD/SAS
Sara Liles*	DHHS DMH/DD/SAS
Alana Heuermann*	DHHS
Brian Cornell	DHHS
Gary Lapio*	DHHS DIRM
Herman Honeycutt	NCDA & CS
Jim Skinner	DOI
Emily McGill	DOL
Dell Pinkston*	DOA
Lucy Cornelius	DPI
Kealani Tulenko	DOC/OSC
Cheryl Ritter*	DOT

Bob Giannuzzi welcomed everyone to the meeting. **Kealani Tulenko, Sara Liles, Alana Heuermann,** and **Brian Cornell** were introduced as first time attendees.

Bob offered congratulations to **Emily McGill** of DOL and **Holly Harmes** of UNC on recently passing their PMP exams. They both participated in the EPMO exam prep classes. Cycle 8 of this program is currently in progress.

Bob solicited and received approval of the September minutes.

Bob advised the group of the following upcoming NCPMI meetings of interest.

NCPMI Venue	Speaker	Date/Topic
General Membership	TBD	<u>TBD</u>
Public Sector LIG	Don Bliss	<u>November 6</u> (5:30 PM) Best Practices for Vendor and Contract Management
PMO Committee	Sam Bayer	<u>October 22</u> (5:30 PM) Facilitation Patterns"...how to recognize and deal with your most common facilitation challenges

Barbara Swartz summarized Methodology Group activities:

- The new Closeout document was included in the end 9/30 release of process changes and is posted on the EPMO website.
- The checklist for monthly status reporting should be available in 4-6 weeks.
- **Alisa Cutler** is working on the revision of the Procurement Plan document. ITS Procurement is participating in this effort.

Bob passed out the following information on upcoming teleconferences of interest to the PM Advisory Group.

Organization/website	Contacts	Upcoming Calls
NASCIO http://www.nascio.org/committees/projectmanagement/	Stephanie Jamison 859/514-9148 sjamison@AMRms.com Access 888/272-7337 conference ID 6916986	<u>November 6</u> (3:00 PM) Organizational Change and the Application of Business Transition Management
PMO Executive Council http://www.pmo.executiveboard.com/	Register at website	<u>October 30</u> (11:00 AM) Managing Your Team and Your Career through the Economic Crisis
CIO Executive Council http://www.cio.executiveboard.com/	Register at website	<u>October 21</u> (12:00 PM) Tools for Managing ERP Upgrades <u>October 23</u> (11:00 AM) Embracing a Service Oriented Architecture Model
Application Executive Council http://www.aec.executiveboard.com/	Contact Bob Giannuzzi to register	<u>October 30</u> (11:00 AM) Quality Assurance and Testing: A Practitioner Panel <u>November 6</u> (11:00 AM) How the Best Companies are Achieving Significant Performance Gains Under High Cost Pressure
Infrastructure Executive Council http://www.iec.executiveboard.com/	Contact Bob Giannuzzi to register	<u>October 22</u> (10:00 AM) Enterprise Collaboration Strategies <u>November 5</u> (10:00 AM) Justifying Investments In Infrastructure Refresh
Information Risk Executive Council http://www.irec.executiveboard.com/	Register at website	<u>November 4</u> (11:00) Information Risk Budget, Spend, and Organizational Benchmarks: Review of Survey Results
Enterprise Architecture Executive Council http://www.eaec.executiveboard.com/	Register at website	<u>October 23</u> (11:00) Accelerating Project Delivery <u>November 13</u> (11:00) Prioritizing EA Activities for Business Value

Barbara Swartz reported that the RFP for bringing in onsite training later this fiscal year is on hold due to budgetary constraints. She advised that anyone who had anticipated participation in any of the potential offerings should revisit their training plans.

Jim Tulenko announced that the project to upgrade the PPM tool to Microsoft PPS 2006 has been cancelled. The upgrade effort was driven by the fact that the current tool is not supported while support of PPS 2006 was slated to end August 2011. Microsoft came back recently with an end of support in April 2009. Other PPM alternatives will be investigated.

Charles Richards demonstrated addition of a Part of Program query (yes/no) on the Project Information tab. Identification of the program can be entered via the Project Associations tab.

Jim Tulenko discussed a proposal to document a sponsor's delegation of authority to sign off on test acceptance and/or change requests. Documentation of such delegation would have to be documented in the Document Management tab. Feedback on this proposal was solicited by the next PMAG meeting.

Jim discussed the requirement for entering total actual costs at Level 4 during Closeout of registrations. This will make for a more accurate calculation of IT expense by OSC. **Lucy Cornelius** asked if hours will also be required. Jim said they aren't, but it would be a good idea to include them. The EPMO is looking at better clarifying the closeout process.

The EPMO is looking to improve the set of PM templates currently available on its website. The group was asked to provide best practices by the next PMAG meeting.

Lessons Learned from a recently closed project are included below.

Meeting adjourned at 3:28.

NEXT MEETING
Monday, November 17, 2008
ITS Conference Room 2 or (919)981-5520

Lessons Learned Documentation

Exhibit A

ITS - June, 2008 Disaster Recovery (DR) Test

“WAR Rooms” Work Well For Test Preparations and Test Management

- A “War Room” with conference phone, meet-me numbers, and LAN connections was set up at 3900 WFR to facilitate coordination of the restoration work during the week of 6/9/08-6/13/08. This worked exceptionally well. Test preparations and issues were coordinated and resolved effectively and efficiently.
- A “War Room” was also set up at the WDC to manage the test activities during the week of 9/16-9/19/08. Meet Me Numbers were left open all day for issues calls, resolution of testing problems, etc. This should be repeated in future tests.

Backup Tapes Required for the DR Test Must Be Clearly Identified

- The tapes on the tape cart that was transported from the EDC on Monday, 6/9/08, were not marked in a manner where SC Data clearly understood that they were required for the DR Test at the WDC. Accordingly, some of the required backup tapes were not delivered to the WDC on Monday the 9th of June as intended. Only a partial set of tapes was delivered on 6/9/08. The remaining tapes were not delivered until Thursday the 12th.
- All backup tapes that are required for service restorations must be clearly identified as such to limit the possibility of a (late delivery and) restoration problem.

Customer Agencies Don’t Disclose All Application Dependencies On The Test Matrices

- For example, as ITS was restoring CPS on Friday, 6/13/08, it became evident that the service was not running correctly. Craig Boyd then remembered from a previous DR Test about a database dependency that had to be resolved. Once the change was made the service ran correctly.
- There were additional services that did not correctly run until ITS resolved other undisclosed dependencies including Web Server dependencies, database dependencies, etc.

It must be assumed that ITS Platform Services staff will have to troubleshoot application restorations because the Client Agencies do not accurately disclose all of their application dependencies to facilitate restoration. Many or most of these Agencies may not clearly understand the dependencies that exist within their services.

Early Service Restorations Allowed All Tests to Be Completed In the DR Test Window

- For the June, 2008 DR Test, the DR Test network was substantially assembled by the week of 6/2/08. All core ITS services, Mainframe Services and Distributed Services were fully restored, including database validations, by Saturday, 6/14/08. This allowed Agency testing to commence early on Monday, 6/16/08, and to conclude by Thursday, 6/19/08.
- As a result of the early start, all Agencies reported successful tests for all services.
- Prior DR Tests had used some of the “Testing Window” for the actual service restorations. This limited the amount of time available for Agency testing and some Agency services were never fully tested until the June, 2008 DR Test.

Solaris Containers Worked Well

- For this test, (2) M5000 Sun servers were procured and loaded with “Solaris Containers” to run multiple Solaris 9 and Solaris 10 applications. This was done in lieu of purchasing sufficient servers to run one service/application on each server. All applications ran successfully in their container environments.
- This is a viable configuration for future needs.

Agencies Will Decide to Test Services After the Deadline Passes for Confirming Tests

- The ITS did not rigorously enforce the “cutoff deadline” for identifying services to test.

- Accordingly, the DHHS decided to test “CATS,” the DPI decided to test “NCWISE” and other last minute additions took place after the “official” test cutoff date had passed.

Service Desk Made Mistakes During the Test Impacting Live, Production Services

- The ITS Service Desk organization did not clearly understand how to respond to testing issues and questions. In at least one case a Service Desk staffmember errantly shut down a live, production, mainframe component system at the EDC as a response to a trouble call. It would seem likely that Desk staffers were not given adequate preparations or training in advance of the DR Test in order to clearly know how to respond to test issues and problems.
- Training for Disaster Recovery Tests in advance of the Tests will better prepare Service Desk personnel for testing conditions and issues

Agency Test Participants Don’t Have Same Urgency As ITS

- During Test Week, 6/16/08-6/19/08 it became evident that selected Agency testing staff did not have a sense of urgency around completing their tests. ITS staff waited in some cases for 1-2 days at a time for Agency representatives to resume testing activities after the Agency testers suspended their work or identified a testing impediment. In several cases, the Agency testing that started on Monday, 6/16/08 extended until Thursday, 6/19/08, though it could have been completed earlier.

Selected Applications Require Shutdown For Successful Backups

- The DPI NCWISE application must be shut down for a successful backup. Accordingly, the backup that was restored for the NCWISE test had to be taken during the May, 2008, NCWISE Maintenance Window some 3 weeks prior to the DR Test. NCWISE was not backed up over the weekend of 6/7/08-6/8/08. Presumably this could violate SLAs if the RPO is <24 hours.